

Personal Pension to PRSA Transfer

Additional Information from Transferring Life Office

Pensions New Business Irish Life Assurance plc Lower Abbey Street Dublin 1									
Client Name									
Client Date of Birth / / /									
Irish Life Reference Number									
Is the transfer from an approved Retirement Annuity Contract issued under the Income Tax Act 1967 or Chapter 2 of Part 30 of the Taxes Consolidation Act 1997?	Yes	0	No	0					
Is the transferring plan ceasing?	Yes	0	No	0					
Have any benefits been paid to the client from this pension?	Yes	0	No	0					
Has a Pension Adjustment Order (PAO) granting part of the benefits to the member's spouse been made on the benefits under the existing pension arrangement, or on any pension arrangement from which the transferring arrangement received a transfer? or	Yes	0	No	0					
Does this transfer represent a non-member spouse's designated benefit granted under a PAO?	Yes	0	No	0					
If yes to either question a court certified copy of the PAO is needed and we require the additional information below.									
Pension Adjustment Order Questions									
A court certified copy of the Pension Adjustment Order is needed in all cases									
Where transfer contains member's benefit only Non-member spouse's details									
Name:Address:									
- Address.									

•	PPSN (i	f known):							
Wh	nere was	non-member spouse's benefit transferred to?							
•	Type of	arrangement:							
•	Name a	and address of provider							
•	Trustee	/ employer (if applicable):							
•	Policy n	umber:							
•	Amount	t transferred: €							
•	Date tra	nsferred: / /							
If you never held the non-member spouse's benefit and cannot answer the questions above then we'll need the following details about the office that originally held the benefits									
•	Type of	pe of arrangement:							
•	Name a	nd address of provider							
•	Trustee	/ employer (if applicable):							
•	Policy n	umber (if known):							
\A/L-	4	for contains the new manches and coals bought only							
		fer contains the non-member spouse's benefit only							
Me	ember spo	ouse's date of birth		/	/				
		ansfer contain pension funds which do not form part of granted under the PAO?	Yes	0	No	0			
Но	es: w much o PAO?	of the transfer represents the amount granted under	€						
		ransfer contains both the member's and non-member Il require these be split as part of any transfer being	•		benefi	t,			
			-						
I coi	nfirm the	answers to all questions in this form are complete and of	correct						
Na	me								
Sig	nature								
Po	sition								
Co	mpany								
	17								
Da	te								